

# Investment Pathways - Discretionary Fund Managers, Multi-Asset & Insurance Distribution Directives

Last Modified on 15/01/2024 12:20 pm GMT

Discretionary Funds Managers, Multi-Assets and Insurance Distributions Directives can be used as part of an Illustration.

Portfolios  
**Discretionary Fund Managers**

Filter by Synaptic Risk Rating  
Select a risk category

Search by Name, Promoter or Range  
Search this list...

| Name                        | Promoter                           | Range   | Asset Class Type | Risk Rating | Risk Category                    | Last Updated Date |
|-----------------------------|------------------------------------|---------|------------------|-------------|----------------------------------|-------------------|
| Passive Moderately Cautious | Seven Investment Management (Ri... | Passive | Strategic        | 5           | Balanced (Low End)               | 21/03/2022, 17:00 |
| 8AM Clever MPS 3            | Clever Adviser (Risk)              | MPS     | Strategic        | 3           | Moderately Cautious (Low End)    | 26/04/2022, 16:51 |
| 8AM Clever MPS 4            | Clever Adviser (Risk)              | MPS     | Strategic        | 4           | Moderately Cautious (High End)   | 26/04/2022, 16:42 |
| 8AM Clever MPS 5            | Clever Adviser (Risk)              | MPS     | Strategic        | 6           | Balanced (High End)              | 26/04/2022, 16:37 |
| 8AM Clever MPS 6            | Clever Adviser (Risk)              | MPS     | Strategic        | 7           | Moderately Adventurous (Low End) | 26/04/2022, 16:37 |
| 8AM Clever MPS 7            | Clever Adviser (Risk)              | MPS     | Strategic        | 5           | Balanced (Low End)               | 26/04/2022, 16:30 |

Portfolios  
**Multi-asset**

Filter by Synaptic Risk Rating  
Select a risk category

Search by Name, Promoter or Range  
Search this list...

| Name                  | Promoter                           | Range | Asset Class Type | Risk Rating | Risk Category                  | Last Updated Date |
|-----------------------|------------------------------------|-------|------------------|-------------|--------------------------------|-------------------|
| AAP Adventurous C Acc | Seven Investment Management (Ri... | 7IM   | Strategic        | 9           | Adventurous                    | 21/03/2022, 16:54 |
| AAP Adventurous S Acc | Seven Investment Management (Ri... | 7IM   | Strategic        | 9           | Adventurous                    | 21/03/2022, 16:57 |
| AAP Balanced C Acc    | Seven Investment Management (Ri... | 7IM   | Strategic        | 6           | Balanced (High End)            | 21/03/2022, 16:55 |
| AAP Balanced S Acc    | Seven Investment Management (Ri... | 7IM   | Strategic        | 6           | Balanced (High End)            | 21/03/2022, 16:58 |
| AAP Income C Acc      | Seven Investment Management (Ri... | 7IM   | Strategic        | 4           | Moderately Cautious (High End) | 21/03/2022, 16:56 |
| AAP Income S Acc      | Seven Investment Management (Ri... | 7IM   | Strategic        | 4           | Moderately Cautious (High End) | 21/03/2022, 16:59 |

Portfolios  
**Insurance Distribution Directive**

Filter by Synaptic Risk Rating  
Select a risk category

Search by Name, Promoter or Range  
Search this list...

| Name                               | Promoter     | Range          | Asset Class Type | Risk Rating | Risk Category                    | Last Updated Date |
|------------------------------------|--------------|----------------|------------------|-------------|----------------------------------|-------------------|
| Risk Managed 1                     | Aegon (Risk) | Risk Managed   | Strategic        | 3           | Moderately Cautious (Low End)    | 16/03/2022, 15:13 |
| Aegon Adventurous Core Portfolio   | Aegon (Risk) | Core Portfolio | Strategic        | 10          | Very Adventurous                 | 16/03/2022, 15:12 |
| Aegon Balanced Core Portfolio      | Aegon (Risk) | Core Portfolio | Strategic        | 5           | Balanced (Low End)               | 16/03/2022, 15:08 |
| Aegon Balanced Plus Core Portfolio | Aegon (Risk) | Core Portfolio | Strategic        | 7           | Moderately Adventurous (Low End) | 16/03/2022, 15:10 |
| Aegon Cautious Core Portfolio      | Aegon (Risk) | Core Portfolio | Strategic        | 4           | Moderately Cautious (High End)   | 16/03/2022, 15:08 |
| Aegon Conservative Core Portfolio  | Aegon (Risk) | Core Portfolio | Strategic        | 2           | Cautious                         | 16/03/2022, 15:08 |

You are able to view the portfolio breakdown by clicking the eye to the left of the portfolio:



Portfolios

## Discretionary Fund Managers

| Name                    |            |
|-------------------------|------------|
| 7IM Passive Adventurous | S          |
| Show Portfolio Details  | bus Plus S |

Portfolio

### 7IM Passive Adventurous | Passive | Strategic

#### Portfolio Summary

Seven Investment Management (Risk)



Risk Profile Category

**Moderately Adventurous**

Risk Rating

**4.8**

Minimum Gain in any 1 Year

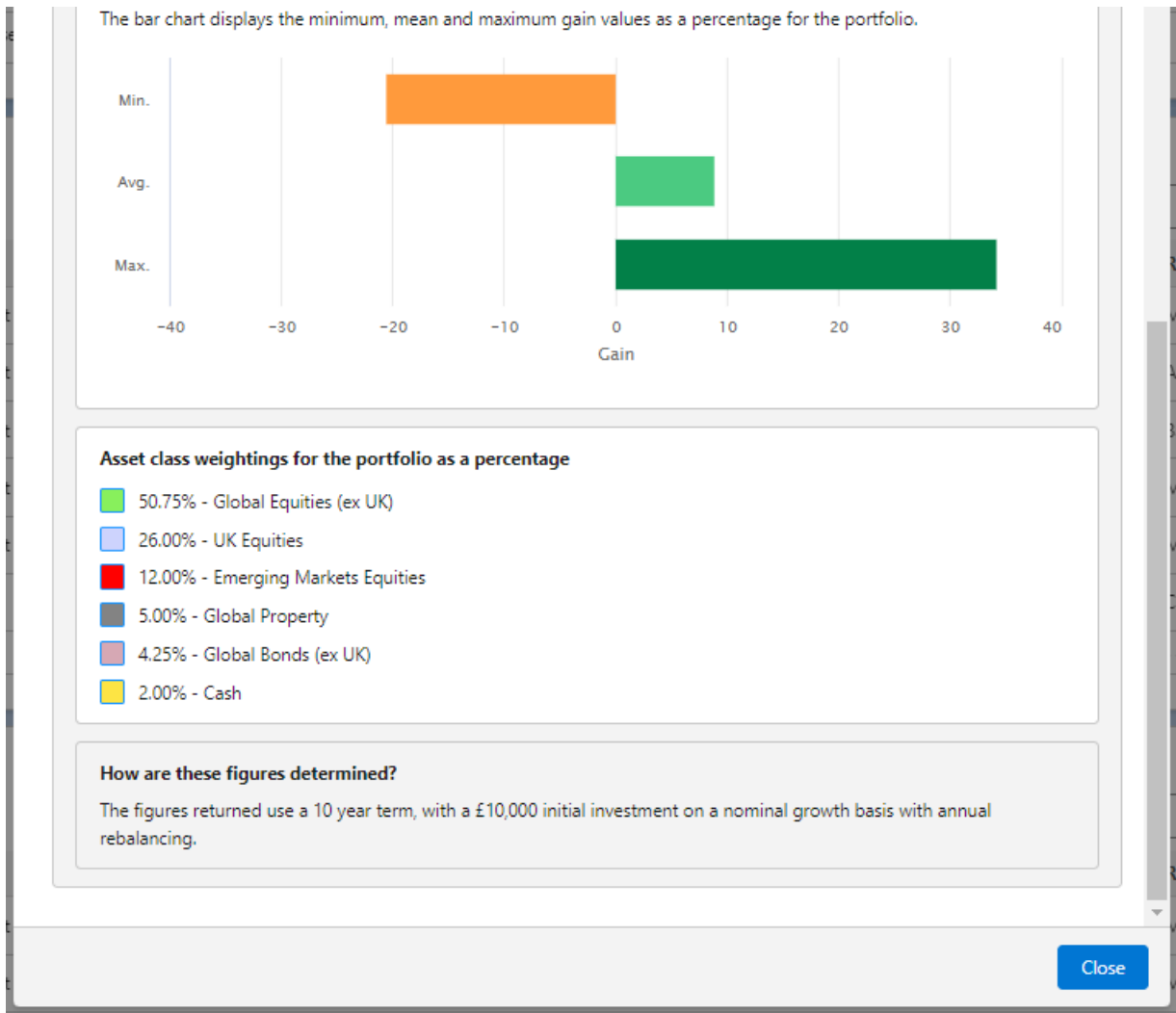
**-20.58% or -£2,058.00**

Average Gain in any 1 Year

**8.87% or £887.00**

Maximum Gain in any 1 Year

**34.3% or £3,430.00**



If you would like to search by risk rating, use the 'Filter by Synaptic Risk Rating' box:

Portfolios  
Discretionary Fund Managers

Filter by Synaptic Risk Rating:

Search by Name, Promoter or Range:

| Name                                | Promoter                               | Range            | Risk Rating                           | Last Updated Date |
|-------------------------------------|--|------------------|---------------------------------------|-------------------|
| Aggressive Active/Passive Portfolio | Cazenove Capital Management Ltd (Risk) | Passive - Active | None                                  | 02/12/2020, 12:32 |
| Aggressive Portfolio                | Cazenove Capital Management Ltd (Risk) | Core             | 1 - Very Cautious                     | 02/12/2020, 12:20 |
| AJ Bell Active MPS 1                | AJ Bell (Risk)                         | Active           | 2 - Cautious                          | 09/12/2020, 12:05 |
| AJ Bell Active MPS 2                | AJ Bell (Risk)                         | Active           | 3 - Moderately Cautious (Low End)     | 09/12/2020, 12:05 |
| AJ Bell Active MPS 3                | AJ Bell (Risk)                         | Active           | 4 - Moderately Cautious (High End)    | 09/12/2020, 12:03 |
| AJ Bell Active MPS 4                | AJ Bell (Risk)                         | Active           | 5 - Balanced (Low End)                | 19/11/2020, 16:52 |
| AJ Bell Active MPS 5                | AJ Bell (Risk)                         | Active           | 6 - Balanced (High End)               | 11/11/2020, 11:50 |
|                                     |  |                  | 7 - Moderately Adventurous (Low End)  |                   |
|                                     |  |                  | 8 - Moderately Adventurous (High End) |                   |
|                                     |  |                  | 9 - Adventurous                       |                   |
|                                     |  |                  | 10 - Very Adventurous                 |                   |

Search by Name, Promoter or Range:

Filter by Synaptic Risk Rating

Select a risk category ▼

- None
- 1 - Very Cautious
- 2 - Cautious
- 3 - Moderately Cautious (Low End)
- 4 - Moderately Cautious (High End)
- 5 - Balanced (Low End)
- 6 - Balanced (High End)**
- 7 - Moderately Adventurous (Low End)
- 8 - Moderately Adventurous (High End)
- 9 - Adventurous
- 10 - Very Adventurous

Portfolios  
**Discretionary Fund Managers**

Filter by Synaptic Risk Rating: 6 - Balanced (High End) Search by Name, Promoter or Range: Search this list...

| Name                  | Promoter                         | Range             | Risk Rating | Risk Category           | Last Updated Date |
|-----------------------|----------------------------------|-------------------|-------------|-------------------------|-------------------|
| AJ Bell Active MPS 3  | AJ Bell (Risk)                   | Active            |             | 6 - Balanced (High End) | 09/12/2020, 12:03 |
| AJ Bell Pactive MPS 3 | AJ Bell (Risk)                   | Pactive           |             | 6 - Balanced (High End) | 09/12/2020, 12:13 |
| AJ Bell Passive MPS 3 | AJ Bell (Risk)                   | Passive           |             | 6 - Balanced (High End) | 09/12/2020, 12:04 |
| Balanced MPS          | Brewin Dolphin (Risk)            | Balanced          |             | 6 - Balanced (High End) | 07/12/2020, 13:36 |
| Balanced Plus         | Rathbones (Risk)                 | Managed Portfolio |             | 6 - Balanced (High End) | 02/12/2020, 14:13 |
| Conventional MPS 3    | Aberdeen Standard Capital (Risk) | Conventional MPS  |             | 6 - Balanced (High End) | 19/11/2020, 16:19 |
| Finsamir Bespoke 3    | Charles Stanley (Risk)           | Finsamir Bespoke  |             | 6 - Balanced (High End) | 03/12/2020, 17:38 |

You can also search by the Name, Promoter or Range:

Filter by Synaptic Risk Rating: 6 - Balanced (High End) Search by Name, Promoter or Range: Search this list...

Filter by Synaptic Risk Rating & Search by Name, Promoter or Range, are available under each of the portfolio types. Only Discretionary Fund Managers, Multi-Asset and Insurance Distribution Directive have the eye icon to view details, as the underlying information can not be opened/amended.

You are able to create and amend your own [Investment Pathways - Model & Bespoke Portfolios](#)